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ABSTRACT

Organized labor in Oregon supports a high-skill, high-wage economic development strategy. The Oregon AFL-CIO Committee on Worker Education and Training has made policy recommendations that support this strategy. The Oregon AFL-CIO believes that fundamental reform of education is needed and recommends the following: emphasis on a high level of academic training to all students, a broad curriculum, student exposure to a variety of jobs, carefully structured youth apprenticeship programs, and labor involvement in educational reform. It encourages adoption of the apprenticeship model and recommends support and strengthening of current apprenticeship programs and expansion of the concept to new industries and jobs. The Oregon AFL-CIO believes the state should increase its investment in the current work force and improve training opportunities for dislocated workers, with labor playing a key role. It urges state and local governments to adopt a high-skill approach as they reorganize the delivery of public services. The Oregon AFL-CIO believes it has a role in changes in worker training and education at the firm level in the private sector. (Appendixes include the following: a 17-item bibliography, resolution to establish the committee, "The Eight Key Elements of High Performance Work Systems" by Ray Marshall; "Union Perspectives on New Work-Based Youth Apprenticeship Initiatives" and "Essential Elements of Model Youth Apprenticeship Programs" by Carol Shenon; "The Meaning of Apprenticeship"--a policy recommendation; and information on state-funded worker training programs.) (YLB)

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WORKER EDUCATION AND TRAINING IN OREGON: THE CHALLENGE FOR LABOR

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WORKER EDUCATION AND TRAINING IN OREGON:

THE CHALLENGE FOR LABOR

Report of AFL–CIO Committee on Worker Education and Training
Adopted by the 37th Annual Convention of the Oregon AFL–CIO
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EDITOR

Margaret Hallock, Director, Labor Education and Research Center, edited the document for publication.

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PREFACE

In 1991, the Oregon Legislature passed the Workforce Quality Act and thereby became one of a few states to adopt the high–wage, high–skills strategy to revitalize the economy. An integral part of the strategy is to strengthen the capacity of labor and business to deliver workforce education and training programs and to participate in the state's efforts.

The new state strategy poses a challenge to the Oregon labor movement. Labor is involved in the development of policy, with representatives on the new state level Workforce Quality Council. And labor is critical in the implementation of worksite education and training as well as publicly funded programs for dislocated workers and new entrants to the labor force. Labor's experience in apprenticeship programs provides a sound grounding for Oregon's new youth apprenticeship programs. We now need an organized strategy to channel this expertise into new programs for Oregon workers.

The Oregon AFL–CIO and the Labor Education and Research Center at the University of Oregon have collaborated to build a coherent platform for Oregon unions on the issues in this complex arena of workforce development. They have been aided in this effort by a grant from the Partnership Division of the Oregon Department of Economic Development (OEDD), the agency charged with building the partnerships among labor, business, and government that are called for in the Workforce Quality Act.

A Conference on the High Skills Strategy

These partners—LERC, the Oregon AFL–CIO, and the OEDD—cosponsored a conference on February 22, 1992, for trade unionists in Oregon to begin to build a platform and agenda on workforce development. Over 150 trade unionists attended this conference titled "High Skills or Low Wages? Setting a Union Agenda on Workforce Training and Skills Development."

The keynote speaker was former Secretary of Labor Ray Marshall, the 1992 Wayne Morse Professor of Law and Politics at the University of Oregon. He presented the findings of the Commission on the Skills of the American Workforce, which he co–chaired. These findings were published in the seminal report, *America's Choice: High Skills or Low Wages!* Marshall painted a grim picture of the decline of the U.S. economy during the last two decades, including lower wages and rising inequality. The major deficit, according to Marshall, is a lack of investment in our workforce. The U.S. invests far less in the education and training of its current and future workforce than our competitors in Europe and Asia. As a result, our manufacturing processes often do not utilize leading edge technology. Marshall urged labor to take a leadership role in worker education for two reasons. First, the future of the American workforce depends upon it. And second, successful education and training programs require a truly joint approach in which workers are well represented and organized.

This theme was echoed by Jan Mears, Executive Director of the British Columbia Nurses Union. She explained the approach of Canadian unions to new technology and new forms of work organization. Unions must come to grips with these developments by pursuing a high–skills approach and becoming advocates for workers to develop their skills and talents. Dan Marschall of the AFL–CIO Human Resources Development Institute, the third keynote speaker, described pilot apprenticeship programs in the aerospace and health care industries, concentrating on the benefits to unions of these sophisticated education and training programs.

The conference included a number of workshops on specific topics such as developing a basic skills program, apprenticeships, and issues in the public sector. Discussants reported back the need for action on a few key points:

* Labor needs an overall strategy on skills, one that is pro-active and makes education and training for workers a high priority for unions. Workers can be empowered by an aggressive approach to skill formation.
* Unions should begin by surveying the membership regarding education and training needs and by analyzing their industries for new developments in production and technology. Unions should become the expert on training for members and not cede it to management and education professionals.
* Resources are needed, including technical assistance in bargaining and developing programs, research on best practice, and funds for leadership and staff development, especially in joint labor–management and communications skills.
* Unions have vast experience in education and training, especially in apprenticeship. This experience should be translated to developing new apprenticeship programs and career ladders in industries other than the building trades.
* Labor should support Oregon's developing workforce policy and push for new funds and joint labor–management initiatives for setting skill standards and training programs.

The AFL-CIO Committee on Worker Education and Training

These comments from participants at the conference on High Skills or Low Wages were forwarded to a new committee of the Oregon AFL–CIO. This committee deliberated for six months and produced the report which follows. The report was adopted by the 37th Annual Convention of the Oregon AFL–CIO along with three resolutions calling for training of labor representatives on workforce quality committees, new joint labor–management approaches to education and training, and development of a fund for workforce training geared to the needs of each industry.

The members of the Committee on Worker Education and Training and the resolutions adopted by the 1992 convention are presented in Appendix G of this document.

This document thus represents the position of organized labor in Oregon on worker education and training. It supports a high–skill, high–wage strategy and calls for an aggressive set of programs to promote full development of the skills of the Oregon workforce.

Margaret Hallock, Director
Labor Education and Research Center
University of Oregon
August 5, 1992

CHAPTER 1

INTRODUCTION AND SUMMARY

The State of Oregon is embarking on major initiatives and policy regarding worker education and training. The 1991 Legislature passed legislation designed to alter our public schools and our workforce training programs. The Oregon AFL–CIO at its 1991 convention established a new standing committee, the Committee on Worker Education and Training to develop a labor position on the issues involved in the Oregon legislation and the national debate on worker education and work restructuring. (See Appendix A.) This document presents the recommendations of this committee.

High Skills or Low Wages?

The United States is at a critical juncture. First, the economy is changing: we face more competition both globally and at home through deregulation and other free–market policies of the Reagan–Bush era. Second, technological change continues to revolutionize production and redefines who is competitive almost weekly. No business or organization can long afford to ignore international changes in technology and its use. Also, government at all levels is being restructured. Budget deficits and tax reform are like global competition for the private sector. In addition, major demographic shifts are having an impact on the workforce. Thus, our jobs are changing and the workforce is changing.

What strategy should the U.S. adopt as it faces global economic competition and technological change? One strategy is to compete by cutting costs, primarily wages—**the low–wage strategy**. This usually means cutting production costs by contracting out jobs, moving jobs overseas to low–wage markets, using technology to deskill jobs, and by using a contingent, part–time and temporary workforce.

The alternate strategy emphasizes enhanced productivity and quality to compete in world markets and domestically. It requires a highly skilled workforce, one that uses leading edge technology and is empowered to control quality, solve problems, and continuously improve technology and production processes. This is the **high–skill, high–wage** strategy, and it has been adopted by most of our competitors in Europe and Asia. The critical ingredients of a high–skill approach are worker participation and a sincere commitment to continuous skill improvement through education and on–the–job training.

Who would want to win the low wage strategy? There is evidence that the U.S. is on this path, and that it is leading to a reduced standard of living and undesirable jobs. We have experienced declining real wages since 1974. We are replacing high–wage manufacturing jobs with lower wage service jobs. More people are working longer hours, but the middle class continues to lose ground.

Requirements of a High–Skills Strategy

A high–skill strategy requires collaboration among business, labor, and government and a dedication to worker education and training. Briefly, a high–skill approach would require:

- businesses to seek skilled workers, upgrade jobs, provide training, and to spurn low–wage quick fixes;
- unions to make education and training a priority and to bargain new programs, such as apprenticeship or career ladder programs;
- a culture at the workplace that empowers front–line workers and accepts unions as important partners; and
- public policy that ties education and training to economic development, that places priority on an improving standard of living, and discourages use of contingent workers and other low–wage tactics.

Former United States Secretary of Labor Ray Marshall has written extensively on the requirements of the high–skill, high–wage strategy. He summarizes the eight key elements of high performance work organizations in Appendix B.

New Policies in Oregon

There is a good deal of national and state debate and policy on these issues. The High Skill, Competitive Workforce Act of 1991 has been introduced in Congress, and Oregon is marching ahead on policies recommended in *America's Choice: High Skills or Low Wages!*, the report of the Commission on the Skills of the American Workforce. The main parts of Oregon's new policy include:

- education reform which stresses school–to–work transitions and more sophisticated general and technical education;
- coordination of publicly funded worker training programs such as JTPA and dislocated worker programs; and
- policies to encourage private sector investment in worker education and training, development of high–performance work organizations, and new partnerships between labor and management.

While efforts to reform the secondary school system will greatly improve the skills of future workers, the fact is that 75% of those who will be working in the next 15 years are already out of school and employed. Therefore, a major effort must be made to upgrade the skills of those already at work.

The most visible aspect of the policy is the appointment of a new Workforce Quality Council to oversee education reform and to coordinate workforce training programs. This Council includes the heads of major agencies, the Chancellor of Higher Education, the Superintendent of Public Instruction, and representatives from labor, business, and community organizations. The labor appointees are Wally Mehrens of the Columbia–Pacific Building Trades Council, Andrea Dobson of Amalgamated Transit Union, and Margaret Hallock of the Labor Education and Research Center at the University of Oregon.

Labor's Position in Oregon

Labor in Oregon and the national level have been deeply involved with this issue over the last decade. Representatives of labor were motivated to participate on the National Commission on the Skills of The American Workforce by being on the frontlines of industrial restructuring and workplace change. The 1983 report "The Future of Work" by the AFL–CIO Committee on the Future of Work was a forerunner of many studies to follow. It recognized the

impacts of technological, occupational and demographic change. It recommended "human resource and productivity development through better education, training, retraining, upgrading and upward mobility opportunities for all workers both employed and unemployed."

That was the essence of the vision presented by Ira Magaziner to the Oregon Legislature for our choice of "High Skills or Low Wages." The National AFL–CIO as well as individual unions such as the American Federation of Teachers, the UAW, the Sheetmetal Workers, and AFSCME have endorsed the recommendations in *America's Choice.*

The Oregon AFL–CIO at its 1991 convention established a Committee on Worker Education and Training. This committee met monthly from December, 1991 to June, 1992, and several sub–committees were also active. This section summarizes the conclusions of this committee regarding the position of organized labor on Oregon's economic development strategy.

1. *The future of the American worker and unions hinges on maintaining high–skill jobs that provide a living wage for workers and their families. Therefore, unions must support the high–wage, high–skills economic development strategy.*

   The economic crisis facing U.S. workers stems from the low–wage strategy. We must reverse the trend in jobs and incomes. One critical ingredient will be maintaining skilled jobs in the U.S. This will require both education and training and a new economic development strategy.

   We will not reverse our declining union membership with lower wages and worsening working conditions. Unions in other countries have discovered that strong unions are essential to a high–wage strategy and that workers benefit from upgrading skills, giving more latitude to front–line workers, and utilizing worker know–how to improve the production process. Further, technological change becomes more worker–friendly in a high–skill production process rather than leading to layoffs and duller jobs.

   Unions must support full employment policies and other policies designed to take labor out of competition and promote equity. A worker–centered strategy will not be successful without meaningful macroeconomic strategies that promote economic justice along with economic growth.

2. *This means that unions must adopt pro–active policies and programs on new technology, work organization, and other characteristics of "high–performance work organizations."*

   A union position would call for a role for strong unions and worker participation in critical areas of decision making. For example, unions in Australia have formulated a union strategy linking skills training, work redesign, and economic development. Consider the following positions of the Australian Council of Trade Unions:

   > To maintain and improve living standards, Australia requires a shift from low value added, low skill, domestically oriented production to higher value

added production and services directed towards the global market. This can only be achieved through a continuous process of employees adding to their learning and responsibilities in new forms of work organization and professional development throughout a working lifetime.

Workers must be provided with greater scope for individual initiative, judgement and responsibility for quality outcomes. The nature of management and supervision must change from an emphasis on control and direction to one which coordinates and develops the skills and potential of all employees.

These changes will not be easy. Many of our union structures reflect the Tayloristic structures of management, and organizational change can threaten established structures and contracts.

3. *Unions should promote continuous skill formation for workers and make the workplace a learning place.*

Enhancing productivity must be worker–centered. New technology is abundantly flexible, but the most important element in productivity growth is the worker. Therefore, the knowledge and skills of *workers* are the most important element in a high–wage economy.

Specifically, we adopt the following propositions put forward by the Canadian Labor Movement:

- Training is a *right*. This right should be universal—that is, available, without barriers to all workers.

- Training is a *fundamental part of a job*. Workers should have access to training during working hours with full pay.

- Training is a tool for greater *equity*. It is a tool for overcoming the particular inequities in the labor market faced by women, visible minorities, native Americans, the disabled, and lower–paid workers.

- Workers and their *unions must have a central role* in determining, at all levels, the direction of training.

Unions should establish a worker education and training committee in each local to assess needs and implement new programs.

4. *Workplace education and training programs must be worker–centered. They should:*

- take into account all of the needs of the worker, including needs for learning and social support systems;

- involve the union in curriculum and assessment;

- be broad–based and include important subjects such as strategic planning, industrial and economic analysis, and communications and problem–solving skills; and

- reflect teaching techniques designed for adults.

5. *Unions have a responsibility to our youth to participate in education reform.*

   Oregon public schools are being overhauled along the lines suggested in *America's Choice*. The curriculum and teaching method will be extensively altered. Unions should be involved in order to assure that the curriculum meets the needs of our youth in the areas of personal development, promoting appreciation of participative democracy, and an understanding of labor unions and collective activity, in addition to providing enhanced professional and technical training.

   Unions should also assist in developing structured work experience in union shops and social service agencies, and unions should help with the school–to–work transition for our youth.

6. *Unions have a long history of successful apprenticeship programs. These should be protected and become the model for new programs.*

   The apprenticeship model is now recognized as perhaps the most successful model of worker training. Its success is due to the joint approach, the maintenance of high standards, connecting learning slots to a job, and the combination of on–the–job and classroom learning.

   This model has important lessons for other industries. It would be helpful to model certification and career–ladder programs after apprenticeship programs. However, only true apprenticeship programs should be given the name apprenticeship, and we must be sure to protect current successful programs.

7. *Current publicly funded programs are inadequately funded and coordinated.*

   The AFL–CIO supports Oregon's efforts to better coordinate federal and state training programs. We recommend enhanced training for dislocated workers.

   Labor representatives should be included on all state and regional Workforce Development Committees, and they should receive training on Oregon's policies and the role of labor.

8. *Unions should support education trusts or other new funds in order to broaden workplace learning programs.*

   In cooperation with affiliates, the Oregon AFL–CIO should study employer assessments, joint trusts and the use of the unemployment insurance mechanism to provide new resources for training. U.S. employers currently underinvest in education and training relative to other industrial nations, and we need to find ways to reverse this.

   The Committee recognizes that it is essential for labor to develop allies among private sector employers in order to pursue a comprehensive strategy for workplace education and training. Both employers and unions need to place more emphasis on education and training and develop the organizational capacity to deliver world–class training programs.

CHAPTER 2

EDUCATION REFORM AND THE SCHOOL–TO–WORK TRANSITION

Background

The State of Oregon is in the process of implementing legislation that will restructure its public schools. The education reform is part of a larger strategy to produce the best educated citizens and workforce in the nation and equal to any in the world by 2010.

The main features of the education reform (often referred to as the Education Act for the 21st Century or the Katz Bill) include:

1. Renewed emphasis on early childhood education, including higher levels of support for preschool education such as Head Start and ungraded primary schools.

2. Restructured public high schools with all schools offering a Certificate of Initial Mastery (CIM) at age 16, with requirements for the Certificate benchmarked to world standards.

3. After the CIM, students would work towards a Certificate of Advanced Mastery at high schools and community colleges. Students would concentrate in one of six strands, such as health and human services, and all strands could lead to work, apprenticeship, or enrollment in higher education.

4. The bill places emphasis on professional–technical education and structured work experience for high school students.

The many details of the reforms are currently under discussion by education professionals, and there are six pilot projects in high schools.

Labor's Position

The Oregon AFL–CIO supported the education reform bill in general. In testimony before the Oregon Legislature, President Irv Fletcher stated that labor supports the bill because it believes in the value of work and opportunity for all students to succeed and because the bill recognizes the importance of employment after education.

Labor believes that fundamental reform of education is needed for several reasons:

- Our education system does not work for the 25% of students who drop out of schools, and it is problematic for many of the 50% who do not go on to post–secondary education. Students flounder in our society in the transition from school to work. This is not a result of age but of the specific features of our education system and labor market. Both should be reformed to ease the transition from school to work and provide real opportunities to all students.

- Our students are not well prepared for the world of work nor to continue their education. Students are unprepared for apprenticeship programs and to work with new technology. There is evidence that

U.S. youth are well behind world–class standards in math, science and other academic subjects.

- Oregon has adopted an economic development plan that is based on high–skill, high–wage jobs. High skill jobs require highly educated workers. While not all jobs currently require high skills, education is clearly a necessary component of a high–skill, high–wage economic development path.

Despite these good intentions, there are several *potential pitfalls and problems* with education reform and youth apprenticeships:

- We must avoid rigid tracking of students into different paths, primarily academic and professional–technical. We are mindful that the current education system tracks students into college–bound and non–college–bound, and this tracking should not reappear in a new and stronger form. Emphasis should also be placed on erasing gender, race, or socio–economic tracking that has prevented many students and workers from reaching their full potential. The education for all youth needs to be upgraded and all youth need multiple options for continuing education.

- While structured work experience can help youth learn about the world of work as well as specific job skills, we must be sure that youth apprenticeships offer valuable education rather than become a source of cheap labor and that the program does not harm the existing workforce. There are huge practical problems with instituting massive work experience programs that could detract from attention to the academic curriculum. We must be sure that youth apprenticeship programs do not flood the market with poorly trained youth without jobs to go to, and we must protect the integrity of current apprenticeship programs.

- There is danger in tying the school curriculum too closely to work. Narrowly defined job skills are no substitute for rigorous academic training that all students need. Further, the occupational areas need to be flexible and broad so that youths do not end up with a narrow set of career or educational options.

Labor's position is well stated in Union Perspectives on *New Work–Based Youth Apprenticeship Initiatives* by Carol Sheehan, Human Resources Development Institute, AFL–CIO, January 1992. The summary of this Monograph is attached as Appendix C.

Policy Recommendations

1. *The most important aspect of education reform is to emphasize a high level of academic training to all students.*

   Solid academic training will help prevent tracking and the tendency to define education for work in narrow terms. More rigorous training in math, science, reading, and foreign language is needed. The emphasis should be on applied academics, but there should not be separate tracks for academic and applied academics students.

   Schools do not need to teach the "mastery" level of skills but should concentrate on a high level of academic achievement for all students that will allow them to pursue further education

or employment in a variety of trades, occupations, and professions.

2. *The curriculum should be broad and not narrowly focused on particular job skills.*

   We support the recommendations of the Secretary's Commission on Achieving Necessary Skills (SCANS) with one important exception (see #3 below). This report concludes that workers need a solid **foundation** in three areas:

   basic skills—reading, writing, mathematics, listening, AND speaking;

   higher order thinking skills—creative thinking, decision making, problem solving, analysis, reasoning, and knowing how to learn; and

   personal qualities—responsibility, self–esteem, sociability, self–management, and integrity/honesty.

Further, the SCANS report recommends that all students achieve **competency** in five areas:

resource management—time, money, material and facilities, and human resources;

interpersonal skills—teamwork, teaching, service, leadership, negotiating, and diversity;

information skills—evaluation, analysis, interpretation, use of computers;

systems—understand, design and improve complex systems; and

technology—select, understand, and maintain technology.

3. *We believe that the SCANS and similar reports have one significant missing element—an understanding of history and the role of labor in society. We recommend that schools offer labor history and curriculum on unions and worker organizations.*

   Students should understand that the organization of work is neither natural nor inevitable but the result of conscious choices. Students should understand the value and role of collective action and solidarity as opposed to relying exclusively on values of individualism and competition.

   These values and concepts could be usefully taught in a cross–cultural framework. Comparing labor organizations and work in different countries is a valuable way to learn about one's own society, culture, and history.

4. *Students should be exposed to a variety of jobs, trades and professions.*

   This can be accomplished with field trips in grade schools, "shadow" jobs in middle and high schools, and rotating work experience in high schools. We are concerned that structured work experience could lead to rigidity in job skills and track students into specific job areas unless there is flexibility and variety in the program.

   Youth apprenticeship or structured work experience should place students in a variety of job locations, both public and private sector, in profit and non–profit organizations. Students should be exposed to public service, community service, and small businesses. Students should learn about social and environmental issues, alternative ownership systems, and unions in these experiences.

Jobs and trades should be portrayed realistically in schools by people from the industry and by visits to workplaces and job safety should be an overriding theme of all job exposure and orientation.

5. *"Youth Apprenticeship" or work experience programs must be carefully structured to provide a valuable education without harming the adult workforce.*

   The *curriculum* for structured work experience should be as broad as possible with many options for higher education. Work experience should be rotated among several occupational areas and interspersed with solid academic work.

   We must develop *organizational and institutional* supports for youth apprenticeship. There are no current organizations that can bridge the gap between schools and employers, and it is unrealistic to expect these organizations to fulfill this major new role. We should explore trade and labor associations such as in Denmark, for example.

   Youth apprenticeship must be made *compatible with current collective bargaining agreements and labor laws*. We must spell out the rights and obligations of parties to the program, liability and workers' compensation issues, and the legal status of youth apprentices. There must be standards and oversight of the program to make sure that all parties are fulfilling their responsibilities.

   We recommend that Oregon develop a detailed specification of structured work or youth apprenticeship programs. An example of such a list is attached as "Essential Elements of Model Youth Apprenticeship Programs," Appendix D of *Union Perspectives on New Work–Based Youth Apprenticeship Initiatives* by HRDI, AFL–CIO. (Appendix D)

6. *Labor must be involved in education reform and establishing youth apprenticeships. Labor representatives should receive appropriate training.*

   The Oregon AFL–CIO urges Central Labor Councils to recruit union members to serve on appropriate Regional Workforce Quality Councils and local school and community college advisory committees.

   We recommend that the AFL–CIO offer training for all unionists who are involved in education reform and worker education and training systems. This training should cover Oregon's education and workforce policy and how to effectively represent labor.

CHAPTER 3

THE ROLE OF APPRENTICESHIP PROGRAMS

Apprenticeship training—learning by doing under the guidance of a skilled worker in combination with classroom training—is the oldest and most successful form of job training. The labor movement has vast experience with the apprenticeship model and encourages others to adopt it. This cannot be done casually because apprenticeship is a rigorous and demanding program. However, the lessons of the apprenticeship model can be successfully applied in many industries and jobs.

Labor's concerns regarding use of the apprenticeship model are effectively stated in "The Meaning of Apprenticeship: When and How to Use the Term, A Policy Recommendation" by The Federal Committee on Apprenticeship, U. S. Department of Labor, January 28, 1992. (Appendix E)

Elements of Apprenticeship Programs

The essential components of apprenticeship include the following;

1. It combines on–the–job training with classroom based training and is sponsored by employers and/or labor–management groups in the industry.

2. The curriculum and standards for completion are dictated by the needs of the industry. National standards are set by workers and employers.

3. Apprenticeship programs have clear responsibilities under federal and state laws. The rights and responsibilities of the apprentice and the employer are clearly defined, including wage progression, skills acquired, and length of training.

4. Apprenticeship programs lead to certification of skills and official journeyperson status which is recognized in the industry.

5. Most apprenticeship programs are jointly operated by unions and employers and require a sizable investment by the parties.

6. Apprentices are paid during training, and there is a defined wage progression.

7. Apprenticeship is a training strategy in which participants learn by working directly under the supervision and tutelage of masters in the craft or occupation.

8. There is a link between the training opportunity and a job. Employers have a duty to provide training, and the apprentice has a reasonable right to expect employment upon completion.

Apprenticeship has been successful because it effectively combines on–the–job training with rigorous classroom training. Instructors are from the industry themselves and are experienced in the skills of the program as well as instruction.

There is a problem with calling programs that do not meet these elements apprenticeship programs. Workers who complete apprenticeship programs have industry–defined skills at industry–accepted standards of performance and can reasonably expect to be employed.

Policy Recommendations

1. *Training programs which do not meet the essential elements of apprenticeship should not be called apprenticeship programs.*

   Apprenticeship programs have a long and successful history, and the certificate still has a good deal of meaning. In order to preserve the strength of current programs and the value of the apprenticeship credential, other programs should not be called apprenticeship programs.

   Training programs such as youth work experience, two–plus–two, technical–professional education, and cooperative work experience may be valuable in their own right, but they are not apprenticeship programs that lead to certification of industry–defined skills and a job.

2. *Current apprenticeship programs should be supported and strengthened.*

   Current programs are successful because of the link to a job and joint control between employers and labor. Students should not be placed in apprenticeship programs unless there is demand for workers in that occupational area, and labor should retain a major voice in setting standards and providing training.

3. *The apprenticeship concept should be expanded to new industries and jobs.*

   The concept of apprenticeship training is applicable to many jobs and industries. European countries have successfully established sophisticated apprenticeship programs in trade, finance, health care, and administration. The Department of Labor is piloting programs in health care.

   For apprenticeships to be successfully established, new forms of organization may be necessary. Employers and workers should develop some form of industry–wide organization, for example, employer associations and industry–wide unions. Unions may need to develop structures to represent workers in multi–employer arrangements, thereby combining some features of craft and industrial unions.

4. *Even where a full apprenticeship program is not feasible, the lessons of apprenticeship programs can be used to develop career ladders and new training opportunities for workers.*

   Apprenticeship programs are difficult to establish. They require a significant investment and the development of recognized skill standards and certification requirements. However, the lessons of apprenticeship programs, the features that make them successful, can be applied in many settings. These lessons include:

   - the importance of combining on–the–job training with classroom learning;
   - joint control and participation by employers and workers;

- certification of skills that is recognized and portable;
- a clear progression of skill acquisition and support of the apprentice during training;
- on–the–job training carried out under skilled workers.

These concepts could be applied, for example, in health care to enable nurses' aids and other similarly skilled workers to progress in a systematic fashion to higher–skill technical and professional or paraprofessional jobs.

5. *Unions should aggressively pursue apprenticeship and other training strategies that combine on–the–job with classroom training. This approach will benefit unions, and it is one promising approach for upgrading the jobs of women and minority workers.*

Unions that participate in apprenticeship programs are knowledgeable about the industry, technology, jobs, and market trends. Other unions should consider adopting elements of apprenticeship programs and becoming expert in their industries and occupations. These programs offer promise to current workers who are already out of school.

Jobs of the future are good candidates for apprenticeship programs because they will require a high level of both basic skills and specific training.

Unions should expand use of apprenticeship programs and other similar training programs into industries and skill areas that currently make little use of the apprenticeship training model. This will put unions in a strong position for continuing leadership role in apprenticeship and worker education and training.

6. *Guidelines for apprenticeship programs should include strong provisions to encourage the recruitment and retention of women and minority workers.*

CHAPTER 4

PUBLICLY FUNDED PROGRAMS IN WORKER TRAINING AND PROGRAMS FOR THE PUBLIC SECTOR

Introduction

This chapter covers two topics. The main recommendations concern publicly funded worker education and training programs. These programs include the Job Training Partnership Act (JTPA), workforce development programs funded by the lottery, and various adult education programs. Currently, these programs are not well coordinated. The Workforce Quality Council has been charged with streamlining these programs and making them more effective.

The Oregon AFL–CIO believes that the state should increase its investment in the current workforce and improve training opportunities for those victimized by dislocation. Labor has a key role to play in reforming and improving publicly funded education and training programs.

The second topic of this chapter concerns training efforts for public employees, who constitute 1/6 of the United States workforce and are more highly unionized than the private sector. Attention to education and training programs is critical in an era of public sector cutbacks. The public sector has its own choice to make between a high–skill versus low–wage strategy as it reorganizes the delivery of public services. The Oregon AFL–CIO urges state and local governments to adopt a high–skill approach that will involve new forms of work organization and a commitment to training and education.

Labor's Goals for Displaced Worker Training Efforts

1. *A greater amount of money needs to be committed to governmental training programs for dislocated workers in Oregon.* The present funds are insufficient to reach those in Oregon in need of training, which now goes beyond manufacturing, where the original JTPA (Job Training Partnership Act) Title III programs were concentrated. The current Economic Dislocation and Workers Adjustment Assistance Act, effective in 1989, expands the potential for helping dislocated workers; yet the funds available are limiting the number of Oregon workers who are enrolled.

2. *Training and retraining goals must be realistic in terms of the future of the Oregon economy and workforce.* Training efforts should focus on occupations that are already in short supply or are expected to enjoy increased demand. Training for jobs that don't exist or where significant numbers of union members in a particular occupation are unemployed are deceptive and wrongful approaches.

3. *Public worker training programs should target family wage jobs,* those which are high skilled and high paid. Dislocated workers' pay after retraining should be at least 90% of what it was before they experienced involuntary job loss and dislocation.

4. *Training programs must emphasize skills which are transferable and portable and go beyond job specific training.* Flexible and high performance work organizations for Oregon's future demand a highly skilled workforce and training programs ought to feature continuous learning and skill building.

5. *Training programs must accommodate the real needs and life circumstances of dislocated workers.* Programs need to take into account child care arrangements, hours when classes are available, length of classes and courses, impact on unemployment insurance and other benefit programs, transportation needs, language barriers, and adult instructional techniques.

How Should Oregon JTPA Efforts Be Designed?

1. *State and federal training programs and funds must have greater flexibility and coordination.*

   Federal programs for dislocated worker retraining contain restrictions and limitations, which is why the proportion of eligible workers enrolled is so small. Greater flexibility is needed to best enable affected workers to gain access to training, receive unemployment stipends, and effectively participate in retraining programs.

   Given the scarcity of funds, it is important to have such programs be efficient, avoid duplication and use funds with care. Expenditures which are unnecessary, such as providers charging for workers getting their GED, when these are available at no cost at community colleges, must be avoided.

2. *Final payment should be withheld to providers for a short time after the training is completed to ensure trainees are long term employed.*

   We are concerned with continuing and widespread abuse of the JTPA program by some providers and contractors. The intent of this recommendation is to limit abuses and the "quick–fix" approach of some providers who cycle participants through the program as quickly as possible.

What Role Should Labor Play in Program Development?

1. *Labor needs to be involved in the design of training programs.* Labor can help make the training curriculum relate well to worker and labor market needs as well as future training such as apprenticeships. Labor should be involved in the choice of providers and program design.

2. *Labor should be well represented on State and all regional workforce development and JTPA Committees.* Unionists should be encouraged to apply as well as be appointed to Oregon's new Regional Workforce Committees.

3. *Programs should be regularly monitored by labor to avoid abuses* including review of content, role of labor in design, record of placement, and fiscal efficiency. The standing Committee on Worker Education and Training of the Oregon AFL–CIO should carry out this function in coordination with Central Labor Councils and the Workforce Quality Council labor representatives.

4. *The Oregon AFL–CIO shall take a lead in training joint labor–management education committee members and labor members on all relevant worker training bodies,* utilizing appropriate agencies such as the Labor Education and Research Center at the University of Oregon.

What New State and Related Public Efforts Might Be Developed and How?

A. *Programs Affecting Public Employees*

1. Public employees are not covered under the existing federal WARN legislation; there are no mandated 60 day advance notice requirements for pending layoffs.To help cushion the effect of public worker dislocation in Oregon, advance notice is needed. The current calls for "downsizing" Oregon state government in light of the economic crisis over tax revenue and ability to fund public services make imperative the need for help in public sector employment transition.

   We recommend that the Oregon AFL–CIO pursue legislation for the public sector equivalent to the Federal WARN or advance notice legislation.

2. Reductions by attrition, although avoiding layoffs, may cause speedups and stress for those left employed and therefore seem a wrong policy. Further, they result in random cuts depending on where people exit. More rational approaches leading to program cuts seems logical and is a more worker–oriented strategy. *Where budget reductions are unavoidable, strategic program cuts are preferable to "thinning the soup" with reduced staffing across the board.*

3. *Public sector employers should transfer, deploy and retrain to avoid layoffs.* Laid off workers and those in positions targeted for layoffs should get first option for training. Displaced workers should be retrained for jobs elsewhere in the organization. "Job banks" can be used to match workers facing layoffs with job openings elsewhere.

4. *All public agencies should target 2% of payroll for skills training, career development programs.* Skills training is critical for achieving work restructuring, organizational and job restructuring, cost savings, and increased efficiency. Worker involvement is crucial to best achieve such ends.

5. *Joint union–management decision–making structures are needed to allow for union participation in public sector training programs.*

B. Public Programs

1. *The funding base for worker skills training and education in Oregon must be expanded.* Several interesting options have been explored and implemented in other nations and in other states in this country. These include flat taxes on payroll for a central worker training fund; tax credits for employers who expend a stipulated percentage of payroll on training; joint funding between government and private sector employers for training efforts, and the like. A survey of state programs in worker training is attached to the end of this report. (Appendix F)

2. *Joint labor–management training committees should be developed in all work places in Oregon with 10 or more employees.* This is parallel to other mandated health and safety committees which under OR–OSHA law is mandated.

3. State funds for training of workers should be channeled through non–profit post–secondary institutions of education and non–profit service providers including unions.

4. *The High Skills Competitive Workforce Act of 1991 ought to be supported in the US Congress, and we call on all members of the US Congressional delegation to support this bill* (S 1790, HR 3470). In particular we note that it would authorize $40 million to the U.S. Department of Labor to make grants to stimulate high performance worker organizations and help employers, unions and consortia by disseminating information and providing technical assistance. Further, there would be a $25 million allocation for support of High Skills Training Consortia, targeting small business.

CHAPTER 5

ENHANCING PRIVATE SECTOR EFFORTS IN WORKER TRAINING AND EDUCATION

This section of our recommendations deals exclusively with the role of the State Federation of Labor in facilitating changes *at the firm level* of the Oregon economy, as opposed to the State policy level, or within the secondary and higher education institutions. Unions have been active in helping to create a better educated workforce through the collective bargaining process for more than a hundred years—the existence of apprenticeship programs in the building trades being the most visible success story. Our intent here is to extend this effort further —into the manufacturing and service sectors of the Oregon economy.

The creation of the Workforce Quality Council by HB 3133 in 1991 makes Oregon's plan to develop a highly educated and trained workforce the most comprehensive of all state governments in the country. One of the unique aspects of this legislative effort is its attempt to make labor a full partner in developing strategies for reform of education and training policy.

The Oregon AFL–CIO recognizes that working men and women and their unions have unique contributions to make in planning education and training changes within individual firms in the private sector. Most importantly we recognize that these changes are too important to be left to state officials or business leaders alone. Our efforts must insure that worker education and training efforts are truly "Worker Centered" in how they approach the needs of individual workers and whole industries.

The committee addressed three specific questions regarding private sector policy issues:

- How can the Oregon AFL–CIO assist affiliated local unions in developing effective education and training programs with employers?
- What legislation should the Oregon AFL–CIO sponsor that will further education and training opportunities for workers in the private sector?
- What efforts should the Oregon AFL–CIO make to work with individual employers or associations of employers to seek common ground in creating education and training initiatives?

How the State AFL–CIO Can Assist Affiliates

The collective bargaining process is the domain of individual local unions and their Internationals, not the State Federation of Labor. However, the Oregon AFL–CIO supports certain general principles with regard to the negotiation of agreements concerning education and training issues.

A recent University of Oregon report indicates that training and education programs have been a relatively low bargaining priority for Oregon unions in the past. It also indicates that the most comprehensive

training and education opportunities existed in companies where labor had taken a proactive approach to negotiating agreements that guarantee the union a role in designing and carrying through the program. The committee supports this proactive philosophy and encourages affiliates to better prepare themselves to participate in education and training programs by developing internal expertise ("capacity") to negotiate over the terms of their creation, implementation and evaluation.

1. To support this general approach we have adapted a set of principles, many of them drawn from the AFL–CIO's Human Resources Development Institute and the Ontario Federation of Labour. *In order for workplace related training and education programs to adequately address the needs of workers they must address these concerns*:

Principles of Worker Centered Learning Systems:

- Programs should build on what workers already know and should reflect workers' identification of their skill needs.
- Programs should address the needs of the whole person, not simply the narrowest requirements of a particular job or task.
- Workers and their unions must be involved in developing and planning programs.
- Workers must have equal access to education and training programs in their workplaces.
- Curriculum content and program structure must reflect the diverse learning styles and needs of adult workers.
- Workers should be involved in helping to design any tests or assessments used for evaluating individual training program participants or program curriculum.
- All classroom records must be kept confidential.
- Education and training must enable workers to have more control over their jobs, and more job security.
- Education and training programs should help people work more safely, and learn about individual and collective rights.
- Programs must support the development of good job design, and technology that enhances the skills of workers.
- Education and training initiatives which involve joint labor–management cooperation and the reorganization of the labor process must be based on equal participation by labor unions, and must guarantee the institutional integrity of the union. Work reorganization should be approached in a proactive way by unions. Joint labor–management initiatives must build solidarity in locals unions rather than subvert it.

2. *The Oregon AFL–CIO will assist affiliates by making available material resources that address private sector workplace education and training issues.* It will also help facilitate internal union education programs, through institutions like LERC at the University of Oregon, to prepare locals to negotiate over the terms and conditions of workplace education and training programs ("capacity building").

   The Oregon AFL–CIO will seek funding from the state or federal agencies to develop a curriculum for local union capacity building in the area of workplace education and training, either by itself or in conjunction with the Labor Education and Research Center.

3. *The Oregon AFL–CIO urges affiliates to create local committees* to assess the education and training needs of its members and employers and to generate creative ideas for the implementation of worker centered programs in their respective workplaces.

Legislative Efforts to Encourage Education and Training in the Private Sector

While efforts to reform the secondary school system will greatly improve the skills of future workers, the fact is that 75% of those who will be working in the next 15 years are already out of school and employed. Therefore, a major effort must be made to upgrade the skills of those already at work. Unfortunately, the typical American company spends less than 2% of its total payroll on the continuing education and training of its workforce. German employers, for example, spend at least twice this amount.

1. *In order to increase the level of private sector workforce training in Oregon, the Committee recommends that the AFL–CIO pursue the creation of a state fund for this purpose.* (For a preliminary discussion of this issue see Appendix F.)

   The Oregon AFL–CIO, through the standing committee on Worker Training and Education, should examine existing funding programs, Labor's involvement in the formulation of those programs, and Labor's evaluation of existing funding mechanisms.

2. *The Oregon AFL–CIO, after examining the findings of the committee, should draft a legislative package for our state.* That legislation should address the following issues:

   - The funding mechanism must insure that large and small employers are treated equitably.
   - The funding mechanism must require labor representation in the creation, delivery, and evaluation of all education and training programs whether they are offered inside individual firms, through community colleges or voc–techs, or by private training organizations.
   - The funding system must respect the integrity of existing, negotiated labor–management education and training programs, such as the apprenticeship systems in various industries.

   Employers who already provide adequate training opportunities for

their workers should be recognized for their efforts. Comprehensive, pre–existing programs, like the jointly managed apprenticeship programs in the construction industry, should qualify employers for an exemption from contributing to a statewide training fund.

- The funding system should include provisions that reflect the philosophy of the above stated "Principles for Worker Centered Learning Systems."
- The legislation should preclude employers from using funds as mere wage subsidies for inadequate and superficial "on–the–job" training programs.

Efforts to Create Coalitions with the Private Sector Business Community

1. *The committee recognizes that it is absolutely essential for labor to develop allies among private sector employers in order to pursue a comprehensive strategy for workplace education and training.* A crucial difference between our system and that which exists in Europe is the presence there of both strong employer associations and widely organized unions that have explicitly recognized the value of ongoing, well funded training and education opportunities for their workers.

2. *The Oregon AFL–CIO supports education efforts among employers* which focus on workplace education and training issues and which increase the capacity of businesses to create more programs in the area.

3. *The Oregon AFL–CIO stands ready to meet and work with employers and associations* where their education and training efforts are seen by affiliated local unions as positive steps towards greater job security and enhanced skill development for workers.

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APPENDIX A

RESOLUTION PASSED BY 1991 OREGON AFL-CIO

RESOLUTION NO. 32

Introduced by Irv Fletcher, President, Oregon AFL-CIO

Referred to Education Committee

Committee on Worker Education and Training

WHEREAS, global competition, technological change, and economic restructuring are having an immense impact on jobs; and

WHEREAS, most employers in the United states are currently choosing a low-wage, low-skill path in order to compete globally; and

WHEREAS, high-skill, high-wage jobs are the only way to reverse the growing inequalities in incomes and jobs in the U.S. and a better path to competitiveness; and

WHEREAS, developing high-skill, high-wage jobs involves the entire workplace, including work organization, production processes and shop-floor relations; and

WHEREAS, the changing workforce and jobs will require continuing education and training of new workers and current workers in all industries; and

WHEREAS, the rapid transition of the Oregon economy and forest products industry requires worker assistance, education and training; and

WHEREAS, labor has been a leader in developing excellent apprenticeship programs which should be a model for new training programs in other industries; and

WHEREAS, unions, in order to represent workers in a fast-changing economy, must be involved in skill development, skill certification, worker education and job development; and

WHEREAS, the United States has an inferior workforce training and education system and spends less than other industrial countries on worker education; and

WHEREAS, the University of Oregon Labor Education and Research Center is coordinating a major conference, "Worker Education and Training—Labor's Agenda," in February, 1992; and

WHEREAS, the state of Oregon has launched a major workforce policy, including the establishment of a Workforce Quality Council which will oversee a strategic plan to make Oregon's workforce among the best in the world; and

WHEREAS, the Oregon AFL-CIO and its affiliates should be active participants in this policy; therefore be it

RESOLVED, that the Oregon AFL-CIO establish a Committee on Worker Education and Training to develop a strategy and agenda for Oregon unions to participate in Oregon's workforce policy and to assist unions in developing worker-centered training programs, and to support current union apprenticeship programs, and be it finally

RESOLVED, that this Committee will be appointed by the President of the Oregon AFL-CIO and staffed by Oregon AFL-CIO staff.

APPENDIX B

THE EIGHT KEY ELEMENTS OF HIGH PERFORMANCE WORK SYSTEMS

As Identified by Dr. Ray Marshall
in Keynote Address to
AFL-CIO Human Resources Development Institute
Conference on "High Performance Work and Learning Systems"

September 26-27, 1992—Washington, D.C.

The most successful "high performance" workplaces feature the following eight components, all functioning together as an integrated and mutually supportive system.

1. Effective use of all company resources, especially the insights and experience of front–line workers, in order to achieve continuous improvements in productivity.
2. Acute concern for the quality of products and services in order to satisfy the demands of a consumer–driven marketplace.
3. A participative and non-authoritarian management style in which workers—both at the point of production and at the point of customer contact—are empowered to make significant decisions by (1) using their individual discretion, experience and creativity, and (b) cooperating with their peers in a mutually supportive atmosphere.
4. Internal and external flexibility in order to: (a) rapidly adjust internal production processes to produce a variety of good or services; and (b) accurately comprehend the external environment and adjust to changing economic and social trends.
5. A positive incentive structure that includes: employment security; rewards for effectively working in groups; decent pay and working conditions; and policies that promote an appreciation for how the company functions as an integrated whole.
6. Leading-edge technology deployed in a manner that extends human capabilities and builds upon the skills, knowledge and insights of personnel at all levels of the company.
7. A well-trained and well-educated workforce capable of: improving a company's work organzation and production processes; adapting existing machine technology and selecting new equipment; developing new and improved products or services; and engaging in continuous learning, both on-the-job and in the classroom.
8. An independent source of power for workers—a labor union and collective bargaining agreement—that protects employee interests in the workplace; helps to equalize power relations with management; and provides mechanisms to resolve disagreements that arise because of the inherently adversarial nature of labor-management relations.

APPENDIX C

UNION PERSPECTIVES ON NEW WORK-BASED YOUTH APPRENTICESHIP INITIATIVES

by Carol Shenon, Human Resources Development Institute, AFL-CIO, 1992. pp. 34-35.

III. Final Comments

This report presents the attitudes of 14 labor officials in the spring of 1991 toward the youth apprenticeship approach. As the discussion reveals, there is a diversity of opinion not only among the union representatives interviewed, but also within each of the three sectors they represent. Moreover, it is likely that there would have been some variation in the results had different unions been selected to participate. However, while the findings cannot be seen as definitive, they highlight numerous union concerns, supportive views, and suggestions for improvement.

Obstacles preventing non-college bound youth from obtaining jobs with advancement potential, skilled work, and a living wage. Union officials identified six major hurdles confronting the "Forgotten Half." They include: the absence of the basic academic and higher order skills required of today's and tomorrow's workforces; the failure of the federal government to create a school–to–work transition system and focus more employment and training dollars and activities towards those youth that are not immediately "at–risk;" the deficiency of training opportunities in various industries; the shortage of positions to fit the qualifications of these young people; some youths' troubled backgrounds and the crippling effect this has on their performance; the absence of national skills standards, assessment, and certification systems required to obtain and maintain competitiveness; and the underdeveloped work ethic of many of these youngsters.

Positive aspects of the youth apprenticeship model. The labor representatives interviewed noted eight reasons to be supportive of the youth apprenticeship approach. This model could: create a national school–work/apprenticeship transition system; provide valuable job and related skills training; extend the highly effective traditional apprenticeship approach into new areas; introduce youth to numerous occupations and careers which may offer selection assistance; allow youth to understand the context in which they'll apply their learning; motivate young people to work harder by showing them the relevance of their education; encourage the positive interaction of youth and adults; and establish relationships between the youth and employers that could lead to job offers following successful program completion.

Concerns regarding the youth apprenticeship model and suggested solutions. These union officials focused on eleven areas of concern. This approach could: impact incumbent workers in a variety of negative ways; promote the use of program participants as a source of cheap labor; decrease the amount of

time spent learning desperately needed basic academic skills; narrow future career and/or educational options by focusing on the acquisition of skills required by a single occupation or employer; weaken the meaning of the term "apprenticeship"; and increase the number of individuals with particular skills in already tight labor markets. Questions surrounding the sources and maintenance of program funding, the opportunity to expose participants to the union philosophy, the availability of jobs following the program's completion, wages and working conditions, and a variety of other issues were also raised.

Compatibility of youth apprenticeship and existing registered apprenticeship programs. While opinions on the appropriate levels of linkage and/or compatibility of these two systems varied widely, each labor official expressing a view on this matter believed that some manner of linkage and/or co-existence was possible.

Applicability of the youth apprenticeship model in various industries. While the majority of the industrial manufacturing sector and service/public sector representatives expressed support for introducing youth apprenticeship initiatives in their industries, the building trades representatives were skeptical or opposed to it in their jurisdictions.

Union involvement in the youth apprenticeship system. While justifying a major role for unions due to their unique knowledge and talents and stressing the importance of equal representation with employers in program management to foster the program's success, the labor officials also enumerated roles for unions on the various committees involved in the creation, implementation, and evaluation of the system. In addition, they discussed the need for local involvement in and "ownership" of any serious effort.

Union experiences applicable to the youth apprenticeship approach. Unions' in-depth experiences operating traditional apprenticeship and/or other education and training programs revealed numerous lessons applicable to the creation and operation of a youth system. These included the need for labor-management cooperation, advance program planning and design, and the incorporation of the union philosophy into any national effort.

In future discussions of the possible implementation of the youth apprenticeship system, the views documented here merit further examination and serious consideration. With their experience and expertise organized labor is an integral part of the employment and training landscape in this country and must be intimately involved in the design and implementation of any national initiative in this area. Their participation would benefit not only unions, but the entire nation when a superior program resulted from any coordinated effort.

APPENDIX D

ESSENTIAL ELEMENTS OF MODEL YOUTH APPRENTICESHIP PROGRAMS

Published as Appendix D of Union Perspectives on New Work-Based Youth Apprenticeship Initiatives.by Carol Shenon, Human Resources Development Institute, AFL-CIO, 1992. pp. 43-46.

Introduction

The following pages propose a set of essential elements for youth apprenticeship programs designed to link employers, secondary schools, and postsecondary institutions in the provision of alternative routes from high school to high skills careers.

This document reflects discussions involving two different groups: the National Advisory Group for Jobs for the Future's National Youth Apprenticeship Initiative; and the group of co-sponsors of the "Youth Apprenticeship, American Style" conference organized by the W. T. Grant Foundation Commission on Youth and America's Future. It was prepared by Jobs for the Future.

This document does not necessarily reflect the view of the Human Resources Development Institute, AFL-CIO, or the union representatives interviewed in this study.

What is 'Youth Apprenticeship'?

Youth apprenticeship programs combine, at a minimum, three basic elements:

1. Work experience and guided learning opportunities provided for participants by employers within an industry or occupation cluster;
2. A structured linkage between secondary and postsecondary components of the program, leading to a high school diploma, postsecondary credential, and certification of occupational skills;
3. Close integration of academic and vocational learning and of school and workplace experiences through planning and ongoing collaboration between schools, employers, relevant unions, and other key institutions and through innovations in curriculum and instructional strategies in the classroom and at work.

The following sections elaborate on design elements—including issues of structure, governance, and the responsibilities of employers, schools, and participants—that are essential if youth apprenticeship is to be a viable, attractive and worthwhile opportunity for large numbers of American young people. The final sections highlight desired outcomes for participating institutions and learners.

1. Structure

- Program duration of at least two years, including at least one year of secondary and one year of postsecondary education.

- Preceded by a strong career development program beginning with career awareness in elementary school and career exploration in middle school and early high school years.
- Part-time employment during the school year with employer committed to providing guided learning experiences at the workplace.
- Classroom-based program for academic learning, generic literacy and employability skills.
- Structured mechanisms for integration of work experience and classroom instruction (e.g. seminar co-taught by school and workplace personnel; regular meetings of teachers and workplace supervisors to enable use of work experiences in academic and vocational courses; summer internships for teachers with participating employers).
- Adequate initial and ongoing opportunities for staff development of teachers and workplace trainers who will be responsible for the integration of academic and occupational instruction and learning.
- Structured summer component integrating school–based learning and paid work experience.

2. Governance

- Involvement in program planning of key decisionmakers from: employers, industry–specific and statewide employer associations, school district(s), postsecondary institution(s), relevant labor organization(s), state and local government.
- Governance by a board comprised of leaders of these institutions.

3. Employer and Labor Roles and Responsibilities

- Work out mutually–agreeable pattern of participation and collaboration between employers and unions representing workers in participating firms and industries in undertaking the following activities.
- Participate in specifying job–and employability–related competencies that graduates will be expected to have mastered.
- Participate with educators in curriculum design and development.
- Provide work experience and guided learning opportunities for participants for the duration of their enrollment in program.
- Impart agreed–to skills and knowledge through work and training assignments.
- Provide each participant with a structured mentoring relationship with an employee of the firm or organization.
- Designate one or more persons within the firm who will be trained in how to work with and train young adults.
- Participate in orientation and staff development activities to prepare supervisors and employees for participation in program.
- Monitor own and participants' progress towards achieving skill development goals.
- Agree to non–discrimination in selection of apprentices and to non-displacement of existing workers by program participants.

- Sign contract with school and apprentice that specifies these and other agreed upon roles and responsibilities.

4. Secondary School Roles and Responsibilities

- Deliver instruction that prepares young adults for both productive economic participation and effective citizenship.
- Impart academic and work–related skills and knowledge (such as problem-posing; problem–solving, and critical thinking) general enough to be transferable to a broad range of work and life situations.
- Implement applied academics and cooperative learning approaches to classroom learning that draw from the work experience of participants.
- Offer participants structured opportunities for reflection on their work experience, in academic classes and through sound career counseling.
- Ensure that program exit by a participant before the twelfth grades does not jeopardize high school progress and graduation.
- Provide adequate orientation, training, and ongoing staff development opportunities in work–based learning approaches for program instruction staff.
- Ensure that teachers develop a solid understanding of the nature and sequencing of participants' workplace activity.
- Sign contract with students and employer that specify roles and responsibilities.
- Sign letter of agreement with postsecondary school specifying the relationship between their respective components.

5. Postsecondary Institution Roles and Responsibilities

- Offer pre–admission or special consideration to participants who successfully complete the first two years of the program and earn their high school diploma.
- Participate in the process of designing the program's secondary school curriculum.
- Offer one or more courses specially designed for program participants and facilitate scheduling that enables participants to stay at their apprenticeship job.
- Provide career development services to participants, including counseling and placement assistance.
- Sign letter of agreement with secondary school specifying the relationship between the two components of the program.
- Sign letter of agreement with students and employers specifying roles and responsibilities.

6. Student Roles and Responsibilities

- Evidence commitment to program, measured by attainment of agreed–upon benchmarks, such as attendance at school and workplace and demonstration of specified learning outcomes.
- Have structured input into program assessment and redesign over the course of the program.

- Sign contract with school and employer that specifies roles and responsibilities of each.

7. Expected Outcomes for Successful Participants

- Certification of academic and occupational proficiencies that reflect high expectation/high achievement curriculum and are pegged to world–class standards.
- Award of high school diploma after the equivalent of twelfth grade.
- Award of credential of occupational skills achievement recognized at least within the state.
- Award of Associates Degree if participant meets all requirements or of transferable postsecondary credits toward degree earned during the course of the program.
- Ability to continue postsecondary learning in a four–year college program.
- Successful placement in general occupational area for which training has been provided.
- Access to career ladder that progresses to high quality, high wage career.

8. Other Expected Outcomes

- Evidence of employer reconsideration and redesign of work organization to make the firm more of a learning, high performance organization.
- Evidence of progress by schools in integrating problem–solving, learning–to–learn, and other "necessary skills" and hands–on instruction into programs and curricular for all students.
- Evidence of institutionalization of new forms of collaborative effort among employers, labor organizations, school districts, and postsecondary educational institutions.

APPENDIX E

THE MEANING OF APPRENTICESHIP: WHEN AND HOW TO USE THE TERM

A POLICY RECOMMENDATION

January 28, 1992

Prepared by
The Federal Committee on Apprenticeship
U.S. Department of Labor
Employment and Training Administration

Office of Work–Based Learning
Bureau of Apprenticeship and Training

THE MEANING OF APPRENTICESHIP: WHEN AND HOW TO USE THE TERM

A Policy Recommendation Prepared by The Federal Committee on Apprenticeship

January 28, 1992

Increasing national attention is being paid to workforce preparation in the United States. This stems from the growing realization that America's ability to occupy a leading competitive position in the emerging global economy hinges, to a large degree, on assuring that the nation's workforce is second to none. Today, unfortunately, this is not the case. Employers frequently report that significant numbers of young people and adults alike exhibit serious educational deficiencies and are ill–equipped to perform effectively in the workplace. As a consequence, leaders from industry, labor, education, and government are all grappling with how to design educational reforms and education/training strategies that will improve the skills of America's current and future workforce.

In the spirit of this reform, one particular training strategy— apprenticeship— has captured the interest of many policy makers, educators and others who are involved in the national reform movement. Its growing appeal comes as no surprise and, perhaps, is long overdue. Experience both in the U.S. and abroad has repeatedly demonstrated that apprenticeship is a highly effective strategy for preparing people for work. The bulk of apprenticeship programs offered in the U.S. and its territories are in the building trades and manufacturing industries, but there is significant potential to develop apprenticeship programs in a variety of other industries.

The rush to embrace apprenticeship, however, is leading to efforts that could undermine the very pillars of its value. For example, in some instances, apprenticeship is being viewed as a generic concept—one that can be loosely applied to a variety of learning situations. Likewise, others have coined such terms as "youth apprenticeship" to characterize various school–to–work transition programs. Such thinking, while understandable in an environment that begs for creativity and innovation, may be more harmful than helpful to the cause.

What Apprenticeship Is: The Essential Components

1. Apprenticeship is a training strategy that a) combines supervised, structured on–the–job training with related theoretical instruction and b) is sponsored by employers or labor/management groups that have the ability to hire and train in a work environment.

2. Apprenticeship is a training strategy that prepares people for skilled employment by conducting training in bona fide and documented employment settings. The content of training, both on-the-job and related instruction, is defined and dictated by the needs of the industry.[1] The length of training is determined by the needs of the specific occupation within an industry. In the building trades, for example, some apprenticeship programs are as long as five years with up to 240 hours of related instruction per year.

[1]As used herein, "industry" refers to all types of business/workplace settings.

3. Apprenticeship is a training strategy with requirements that are clearly delineated in Federal and State laws and regulations. The National Apprenticeship Act of 1937 (also known as the Fitzgerald Act) and numerous State laws provide the basis for the operation of formal apprenticeship training programs in the U.S.; regulations that implement these laws are in force today. These laws and regulations establish minimum requirements for protecting the welfare of the apprentice such as the length of training, the type and amount of related instruction, supervision of the apprentice, appropriate ratios of apprentices to journeypersons, apprentice selection and recruitment procedures, wage progression, safety, etc.

4. Apprenticeship is a training strategy that by virtue of a legal contract (indenture) leads to a Certificate of Completion and official journeyperson status. These credentials have explicit meaning, recognition and respect in the eyes of Federal and State governments and relevant industries.

5. Apprenticeship is a training strategy that involves a tangible and generally sizable investment on the part of the employer or labor/management program sponsor.

6. Apprenticeship is a training strategy that pays wages to its participants at least during the on–the–job training phase of their apprenticeship and that increases these wages throughout the training program in accordance with a predefined wage progression scale.

7. Apprenticeship is a training strategy in which participants learn by working directly under the supervision and tutelage of masters in the craft, trade, or relevant occupational area.

8. Apprenticeship is a training strategy that involves a written agreement and an implicit social obligation between the program sponsor and the apprentice. The written agreement, which is signed by both the apprentice and the program sponsor and is ratified by government, details the roles and responsibilities of each party. The implicit social obligation gives employers or program sponsors the right to expect to employ the apprentice upon completion of training given the investment in training and gives the apprentice a reasonable right to expect such employment. Labor market conditions should guide the size of training programs to enable each party to maintain his or her side of the obligation.

What Apprenticeship Is Not

Unless they conform to the essential components described previously, apprenticeship is not cooperative education, vocational education, tech prep, two plus two (three or four), summer or part–time work experiences or any of the other myriad training strategies that many are promoting as ways to assure adequate workforce preparation. Such strategies undoubtedly have value in their own right, but they are not apprenticeship. What distinguishes apprenticeship from most of these other approaches are such fundamental qualities as training program sponsorship and location, the skills acquired, the value attached to the credential earned, curricula content that is defined exclusively by the workplace, wage requirements, the written agreement, and the implicit social contract that exists between program sponsors and their participants. No other training strategy provides for this unique combination of characteristics. When a person completes a

registered apprenticeship program, he or she is prepared to go to work as a fully trained, competent journeyperson whose skills enable him or her to perform effectively in the workplace. Few, if any, other types of educational programs can make this claim.

A Policy Recommendation

As the education and training system in this country undergoes its restructuring, how apprenticeship fits in must be considered. Some may argue that the definition of apprenticeship should be broadened to encompass some or all of the previously described alternative training strategies. Unfortunately, this could have the practical effect of seriously undermining a tried and true training strategy—one that, ironically, exhibits all of the qualities that reformers are striving to achieve in new training designs. Of particular concern is the possibility that an expanded definition could significantly dilute the value and meaning attached to the apprenticeship credential. Today, an apprentice who earns a Certificate of Completion and attains journeyworker status from a registered apprenticeship program knows that he or she has acquired industry–defined skills at industry–accepted standards of performance and can reasonably expect to be gainfully employed in his or her occupational area. If alternative training strategies (ones that do not fully conform to the essential components) are also permitted to call themselves "apprenticeship," the apprenticeship credential stands to become devalued. Such a step makes little sense at a time when other credentials—such as high school diplomas—have lost much of their meaning.

Thus, we conclude that the term "apprenticeship" should be reserved only for those programs that adhere to the eight essential components described previously. Other strategies may seek to adopt designs that conform to all the essential components, in which case they may be called apprenticeship. But to call any other types of programs "apprenticeship" is to do a major disservice to the participants in such programs. Whether intentional or not, the participants may be misled into thinking that completion of these programs will allow them to reap the benefits accorded to graduates of true apprenticeship programs.

Clearly, we are on the verge of a major revolution with respect to how America prepares its workforce. As a new national training system emerges in the coming years, considerable thought should be given to the role of true apprenticeship in that new system. On one hand, apprenticeship could be the locomotive that drives this training system. Under this scenario, apprenticeship programs would serve as the principal form of training for preparing the majority of the nation's workforce. Alternatively, apprenticeship may become one of several cars on a train that provides a variety of training options to existing and future workers. This choice requires further study and broader deliberation, but, whatever the outcome, the integrity of the term "apprenticeship" should not be jeopardized or compromised.

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The Federal Committee on Apprenticeship (FCA) is established by charter to advise the U.S. Secretary of Labor on matters pertaining to the U.S. apprenticeship system. The FCA consists of representatives of employers, labor, educators, and others.

APPENDIX F

STATE FUNDED WORKER TRAINING PROGRAMS

The Labor Education and Research Center (LERC) University of Oregon has initiated research into existing state–funded worker training programs. This Appendix provides a summary of our preliminary findings. A 1989 American Society for Training and Development (ASTD) report, New Foundations: State Economic Growth Through Training, provided a starting point. The report summarized the status of state funded programs as of 1989. We are now conducting a survey to obtain updated information (1992).

The LERC survey is focused on programs funded by means other than annual general fund appropriations and programs administered by independent or quasi-independent agencies. In addition, based on the experience of these other states, the survey is helping to identify potential problems that will need to be addressed in developing a program for Oregon.

The ASTD Findings

The 1989 ASTD report found that 46 states provided some form of state–funded, industry–specific programs (some states have more than one program). Most of these programs were developed during the 1980's. The programs are viewed by most states as economic development tools, intended to provide a fast response to the needs of particular industries or businesses for training or retraining their employees. The programs vary substantially in terms of targeted industries or populations but they do have several common characteristics: minimal "red tape," broadly written program rules to encourage flexibility in the design, development and implementation of training programs, and minimal regulation of decisions relating to selection of training providers or locations to encourage custom designed programs which best meet specific training needs.

Funding Mechanisms

Thirty of the 46 programs identified in the ASTD survey were funded by allocations from the state's general fund. Five alternative funding mechanisms (and the states using them) have been identified from the survey:

1. a tax equal to 0.1% of the unemployment insurance tax, (Alaska, California, Delaware, and Rhode Island);
2. tax credits for employers' training costs, (Connecticut, Illinois, Iowa, and Mississippi);
3. the sale of bonds or certificates by community colleges (Iowa and Missouri);
4. dedicated lottery funds, (Florida, Kansas, and Oregon); and,
5. direct loans to employers, (Illinois, Maine, Michigan, and Wisconsin).

Independent Oversight Bodies

Programs in six states operate under independent or quasi–independent boards or agencies. These include the California

Employment Training Panel, Illinois' Prairie State 2000 Authority, Kentucky's Bluegrass State Skills Corporation, Massachusetts' Bay State Skills Corporation and the Industrial Services Program (2 separate bodies), Minnesota's Job Skills Partnership Board, and Rhode Island's Workforce 2000 Council. The California and Rhode Island programs are funded through the unemployment insurance tax method; the other four rely on appropriations from the state's general fund.

Description of funding mechanism

Based on both the ASTD report and our survey to date, we can report the following general descriptions of these five funding mechanisms and some of the issues raised by each.

1. Special Taxes:

   Five states (Alaska, California, Delaware, Michigan, and Rhode Island) levy a special tax to fund their programs. The most common is a tax equal to 0.1% of the employer's unemployment insurance tax. (Michigan's special tax is levied on Worker's Compensation premiums and is limited to funding training programs on occupational safety and health.)

   One of the key facts about this funding mechanism is that it has generally been adopted concurrent with either a reduction of the unemployment insurance tax by an equal amount, or adopted at a time when the unemployment insurance tax rate was being reduced.

   A second consideration regarding this mechanism is that the revenue generated is tied directly to payroll. Thus, in an economic downturn, revenue tends to decline at the same time that interest in training and retraining generally increases. Unless the fund has been managed to provide for this, the program may be underfunded when it is needed most. Similarly, some of the enabling legislation for these taxes allocated the funds raised exclusively for training costs and relied upon existing agency staff to administer the programs. Subsequent tight budgets forced staff to either drop the program administration or expend a portion of the funds on administration. At least one state found it necessary to amend the legislation to provide adequate program support staff.

2. Tax Credits::

   Four states (Connecticut, Illinois, Iowa, and Mississippi) allow a tax credit against the state's corporate income tax or business tax. This is the most common form of indirect funding by states. These systems allow employers to claim credits for expenditure for certain types of training or retraining. Tax credit programs are generally administered through the state's revenue collection agency; thus the administrative focus is on the monetary issues with little or no attention to the training itself. Accordingly, to be successful from an education and training perspective, a tax credit program requires either joint agency administration or specific conditions and limitations built into the statutory language in order to target training efforts.

3. Sale of Bonds or Certificates:

   Two states (Iowa and Missouri) allow the sale of certificates or bonds to finance training programs. The bonds or certificates are issued by local Community Colleges to fund programs that will be provided for employees or prospective employees of a private employer. The bonds create a pool of available training dollars for the employer which are used either for programs offered through the community college, or in–house by the employer with assistance from the community college in program development and implementation.

   The bonds are retired over a ten year period by one of several means. Originally, both the Iowa and Missouri programs relied on tax increment financing (most commonly associated with urban renewal funding) to retire the bonds. This system was found to be unconstitutional in Missouri but is still being used in Iowa.

   The second method for retiring the bonds is for the employer to identify the employees who receive the training and a portion (1.5% to 2.5%) of the state withholding tax paid by those employees is diverted by the Department of Revenue to the Community College retire the bonds.

4. Dedicated Lottery Funds:

   Oregon is one three states which earmark a portion of state lottery funds for training programs. The others are Florida and Kansas. These programs divert a portion of lottery revenues to the state's community colleges to provide targeted training programs.

5. Direct Loan Programs:

   Three states (Illinois, Michigan and Wisconsin) have some form of direct loan programs. Illinois, and Wisconsin provide low interest loans to employers for training costs. Michigan's program pays the interest on loans taken out by employers to train employees. These programs are funded by general fund appropriations in one of two ways, either as an annual appropriation or a one time "seed money" allocation. In concept, the seed money allows a one time general fund contribution to grow through interest and loan repayments into an expanding pool of available money.

   The state of Maine had a loan program which was dropped in 1990, but serves to illustrate some key issues regarding loan options. In order to make these programs attractive to business, incentives such as lower interest rates or longer repayment schedules must be offered. If the seed money approach is utilized, however, the inclusion of these incentives substantially slows the rate at which the seed money will grow and extended repayment schedules necessitate a relatively large initial appropriation.

This was the major problem encountered by the program in Maine. Begun with a relatively small initial appropriation, the program provided low interest loans with a one year delayed repayment schedule.

Theoretically, employers would begin receiving the benefits of the workforce skills upgrading before they had to begin repayment on the loans. However, with dropping commercial loan interest rates and the delayed payment schedules, the fund could not grow and the state could not offer additional incentives.

General Considerations

Regardless of what funding mechanism is adopted, some considerations must be kept in mind. The most fundamental is a determination of whether the design of the program is to encourage employers to expend more of their resources on training and retraining workers or to create a fund of available dollars for training and retraining that is not necessarily tied to the employer who funds it. This is the difference, for example, between a system of employer tax credits and a special tax on unemployment insurance payments.

Another general consideration is targeting. Will the program target particular industries, segments of the population or workforce, or geographic areas which meet some criteria? The underlying issue is how much money will such a program need to be successful and will the mechanism proposed generate that level of funding.

A third consideration is including in the system recognition of efforts that are already underway. For example, if a special tax is levied, it should carry provisions for a system of employer tax credits for contributions to an existing apprenticeship program.

APPENDIX G

WORKER EDUCATION AND TRAINING COMMITTEE MEMBERS AND RESOLUTIONS

Members of the Committee

Harold"Rick" Adams
Carpenters Local 247

Gloria Aleksich
CommunicationWorkers of America

Jessie Bostelle
Oregon Public Employees Union

Dan Campbell
International Brotherhood of Electrical W orkers

Don Casler
Western Council of Industrial Workers

Walt Conner
International Brotherhood of Electrical W orkers

Andy Dobson
Amalgamated Transit Union

Daniel Faddis
International Brotherhood of Electrical W orkers

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Garry P. Goodwin
United Brotherhood of Carpenters and Joiners

Donna Hammond
Columbia Pacific Building Trades Council

Bob Hayes
United Steelworkers of America

Dan Lacy
United Steelworkers of America

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Oregon Machinists Council

Wally Mehrens
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Tim Markwell
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Sheet Metal Workers

Richard Milne
Oregon Machinists Council

John Mohlis
Bricklayers and Allied Craftsmen

Mike Murphy
International Brotherhood of Electrical Workers

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AFL-CIO Region 9

Glenn Shuck
Labor's Community Service Agency

Quint Rahberger
Apprenticeship and Training Division

Marcus Widenor
Labor Education and Research Center

RESOLUTIONS
Adopted by
1992 Oregon AFL-CIO Convention

Resolution No. 24

Introduced by the Committee on Worker Education and Training

Referred to Education Committee

Assistance to Affiliates in Workforce Education and Training

WHEREAS, the Oregon AFL–CIO recognizes the necessity of pursuing a proactive, high wage strategy for economic development; and

WHEREAS, a high wage strategy is dependent on a well educated and trained workforce; and

WHEREAS, the Oregon AFL-CIO has outlined this strategy in its report, *Worker Education and Training in Oregon: The Challenge for Labor;* therefore be it

RESOLVED, that the Oregon AFL–CIO will assist affiliated unions in addressing worker education and training issues by providing them with resource materials and sponsoring education forums that will help local unions and Central Labor Councils develop expertise in these areas.

Resolution No. 25

Introduced by the Committee on Worker Education and Training

Referred to Education Committee

Legislation to Support Workforce Education and Training

WHEREAS, the Oregon AFL-CIO recognizes the necessity of pursuing a proactive, high wage strategy for economic development, and

WHEREAS, a high wage strategy is dependent on a well educated and trained workforce; and

WHEREAS, the Oregon AFL-CIO has outlined this strategy in its report, *Worker Education and Training in Oregon: The Challenge for Labor;* therefore be it

RESOLVED, the Oregon AFL–CIO Standing Commmittee on Worker Education and Training should examine funding mechanisms for private sector education and training programs and recommend to the Executive Board a legislative package that would provide a fund for worker education and training that meets each industry's needs and that protects current apprenticeship programs, and be it further

RESOLVED, that the Oregon AFL–CIO Pursue legislation mandating that all State of Oregon agencies dedicate a sum equal to 2% of payroll for employee skills training and skills development.

Resolution No. 26

Introduced by the Committee on Worker Education and Training

Referred to Education Committee

Alliances with Employers to Promote Workforce Education and Training

WHEREAS, the Oregon AFL-CIO recognizes the necessity of pursuing a proactive, high wage strategy for economic development, and

WHEREAS, a high wage strategy is dependent on a well educated and trained workforce; and

WHEREAS, the Oregon AFL-CIO has outlined this strategy in its report, *Worker Education and Training in Oregon: The Challenge for Labor;* therefore be it

RESOLVED, that the officers of the OREGON AFL–CIO seek to develop alliances with Oregon employers interested in improving workforce education and training opportunities for their firms and industries, and be it further

RESOLVED, that the officers of the Oregon AFL–CIO encourage employer groups to work amongst themselves and with labor in developing education and training programs.

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